Marketo™
An Adobe Company

How to “KonMari” Your Marketo Instance for Peak Performance

Helen Abramova
Matt Gomez | October 2019

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Housekeeping

- This webinar is being recorded! Slides and recording will be sent to you after the webinar.
- Have a question? Use the chat box and we'll answer your questions after the webinar.
- Posting to social media? Use our hashtag #mktgnation

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About

Helen Abramova
Marketing Technology Lead, Verizon
Marketo 2 x Champion
Marketo Revvie Winner
DC/NOVA MUG Leader
@lena_abr

Matt Gomez
Sr. Manager Marketing Operations & Marketo Admin, Walden
Marketo Champion
Marketo Revvie Finalist
Baltimore MUG Leader

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A few notes before we start

- You know your environment better than we do.
- Our advice is purposefully high level [advice, not a recipe].
- You need allies and partners in this journey.
- There is no “magic bullet” for some issues
- …but there might be something that can help in all cases.

If you’ve committed to tidying up, let’s get started!

Why Tidying Up?

EASY

SAFE

EFFICIENT

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“Natural Forces” of Mess

SYSTEM ASPECT

The Second Law of Thermodynamics

The total entropy of an isolated system can never decrease.

HUMAN ASPECT

Broken Windows Theory

Visible signs of disorder encourages further disorder.

PROBABILITY ASPECT

Murphy’s Law [almost]

Anything that can go wrong will go wrong (at some point).

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KonMari Method and Marketo

- Rule 1. Commit yourself to tidying up your instance.
- Rule 2. Imagine your ideal lifecycle.
- Rule 3. Finish foundations first.
- Rule 4. Tidy by category, not by location.
- Rule 5. Follow the right order.
- Rule 6. Ask yourself if it sparks joy of your customers!

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Start slow to move fast:
what you absolutely need to build in the center of excellence

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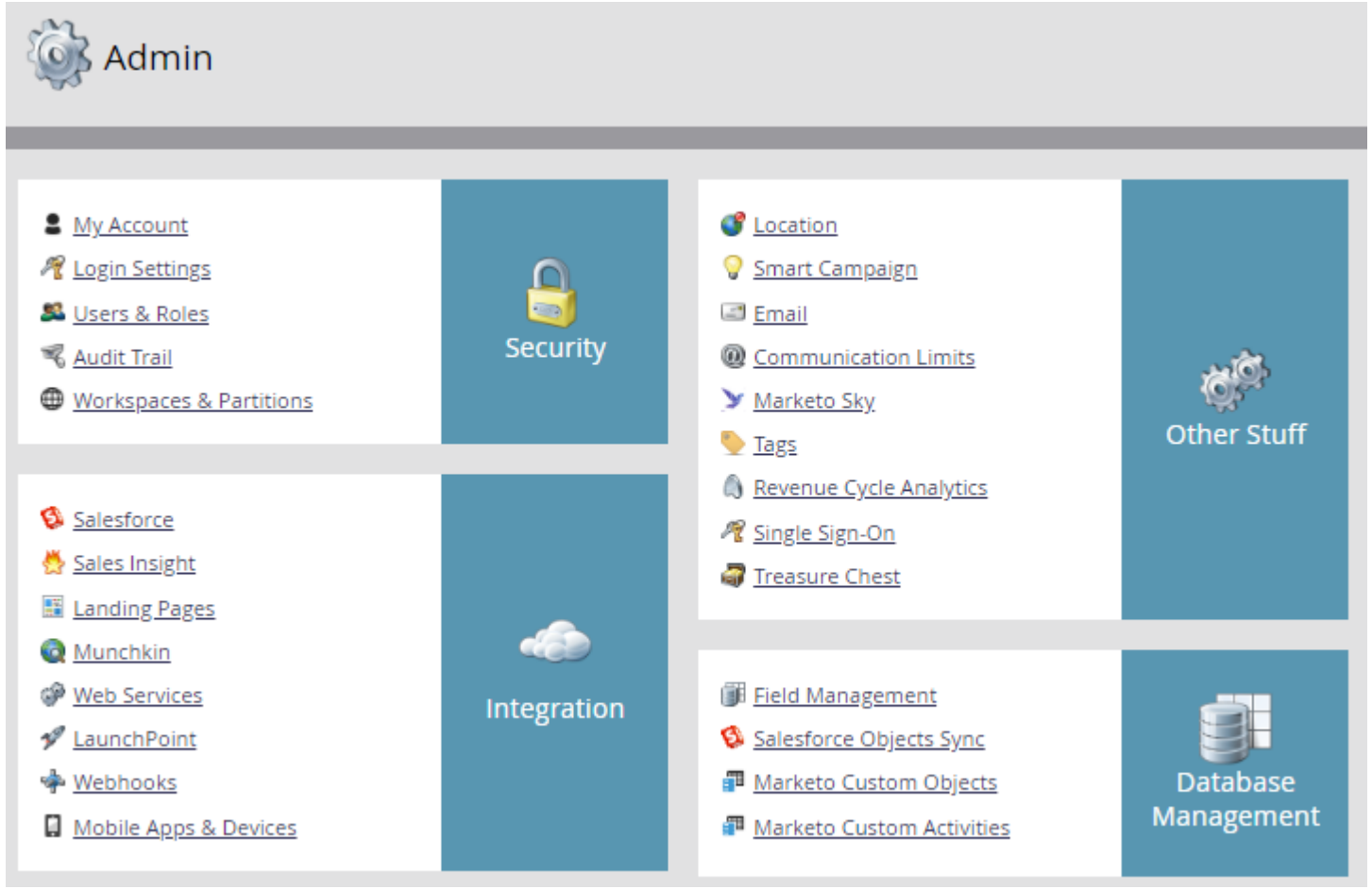
Center of Excellence & Governance

Foundations for tidy users

- Users and Roles
- On-boarding process
- Documentation
- Process and Responsibilities

Foundations for tidy data

- Security and Compliance
- Data Management
- Data Hygiene



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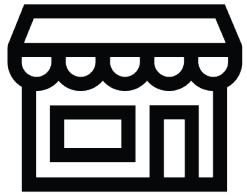
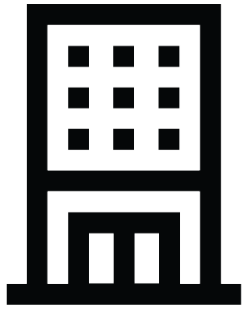
Scale Matters



TECHNOLOGY AS EFFICIENCY

Team of one
Jack of all trades role
Quick and agile
Self help



TECHNOLOGY AS ENABLER

Team of few
Division of labor
Collaboration
Flexible processes

TECHNOLOGY AS AMPLIFIER

Many teams
Narrow specialization
Detailed processes, SLAs
Rules of engagement

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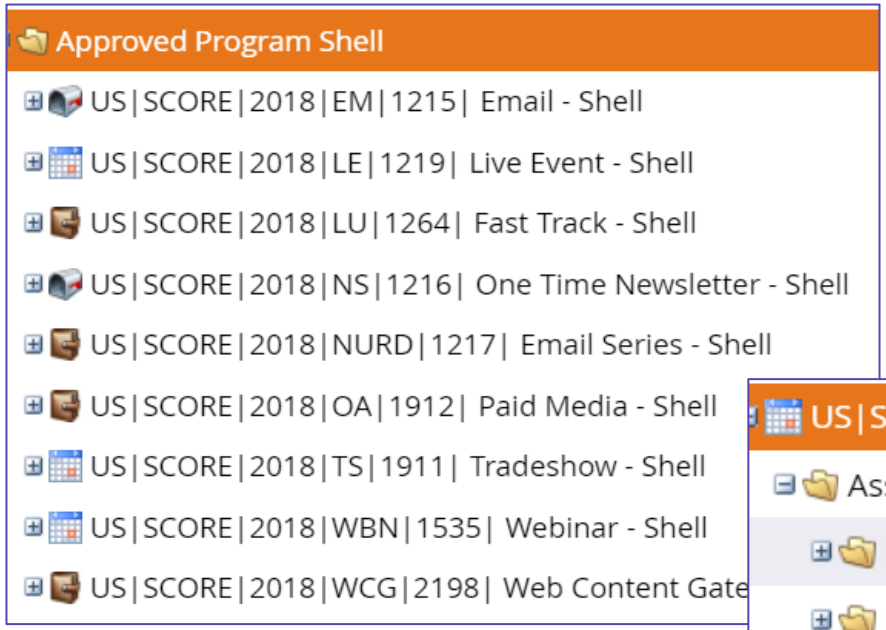
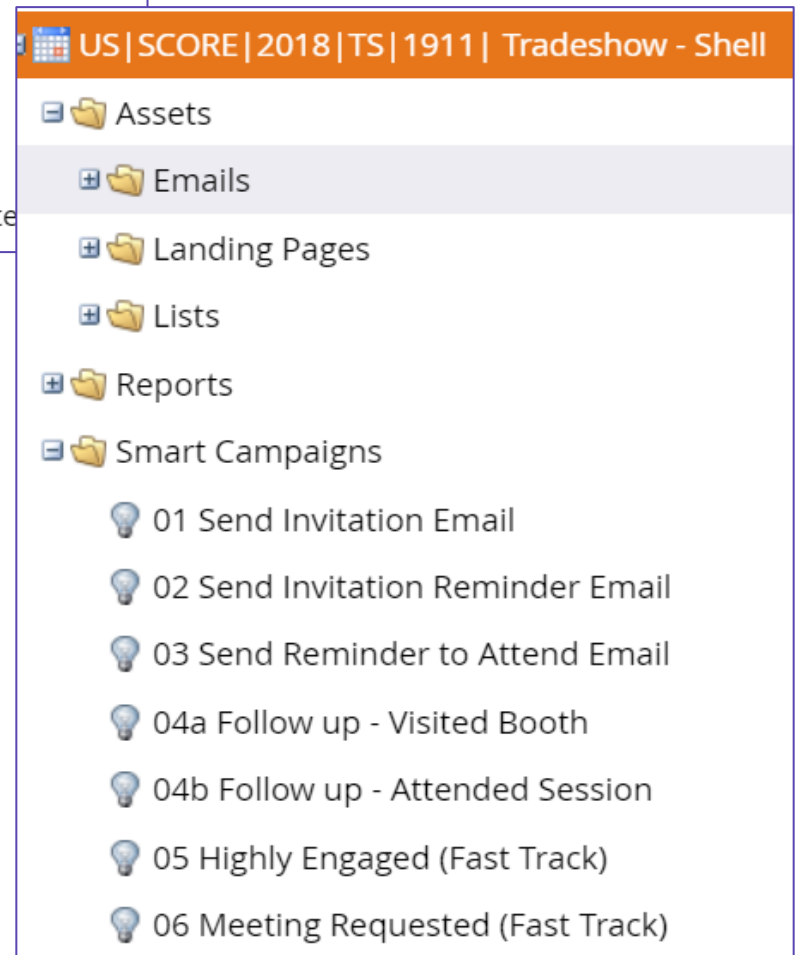
Making Clean Easy

- **Naming Convention**
  for both MKTO and CRM
- **Folder Structure**
  by the usability principle
- **Channels and tags**
  to meet reporting requirements
- **Program shells**
  for each tactic/channel
- **Email and Landing page** templates
- **Standard Forms**
- **Footers** and snippets





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Tidying up your instance:

Remove the mess before it swamps your leads

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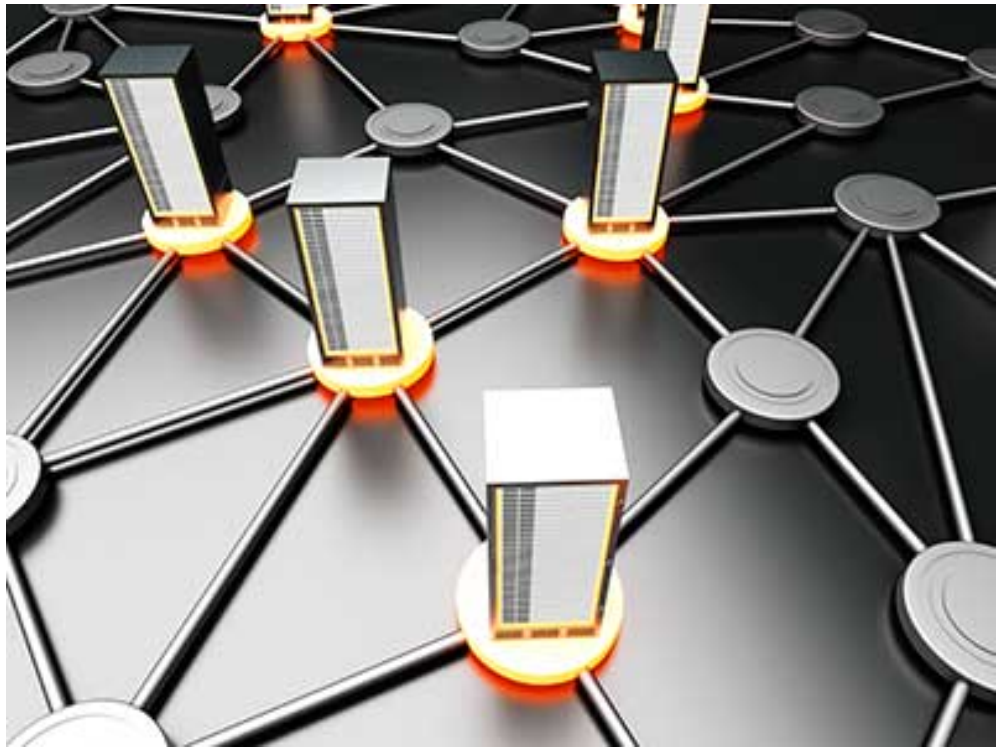
Know your environment

- How is your environment configured?
- Who set it up originally? How long ago? What has changed?
- Is there a CRM synched to Marketo; which one?
- Who do you know in your organization that can help?
- We need to discard first:
  - Undeliverable email addresses
  - Duplicate records
  - Unused fields



KonMari Method Tip – Imagine your ideal lifestyle.

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Undeliverable Email Addresses

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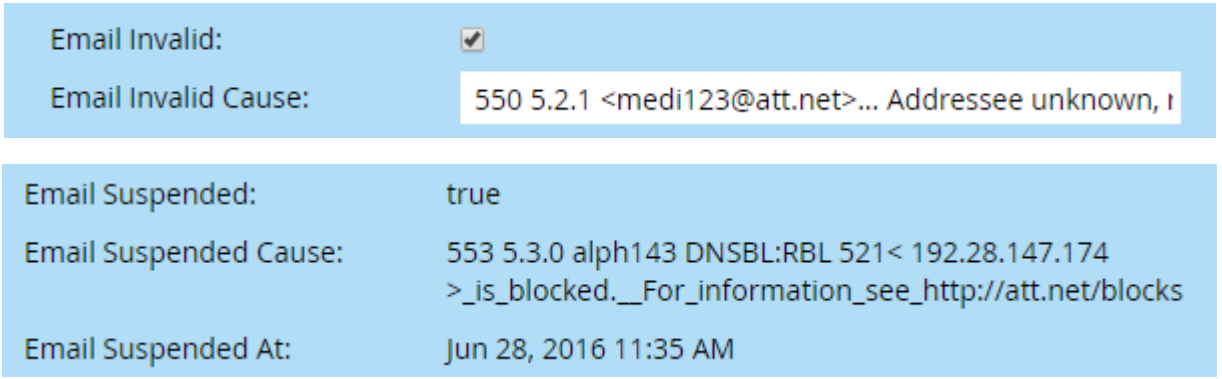
Undeliverable Email Addresses: What does Marketo already do for you?

- Captures data for you
- Marks Email Invalid
- Marks Email Suspended
- Provides the means to build your own solution based on your own model



Gap analysis:

1. Some email addresses marked invalid are fixable
2. Some bounces remain emailable, which jeopardizes your deliverability and reputation
3. There is no one place to see and manage bounces
4. It is unclear where to go for help

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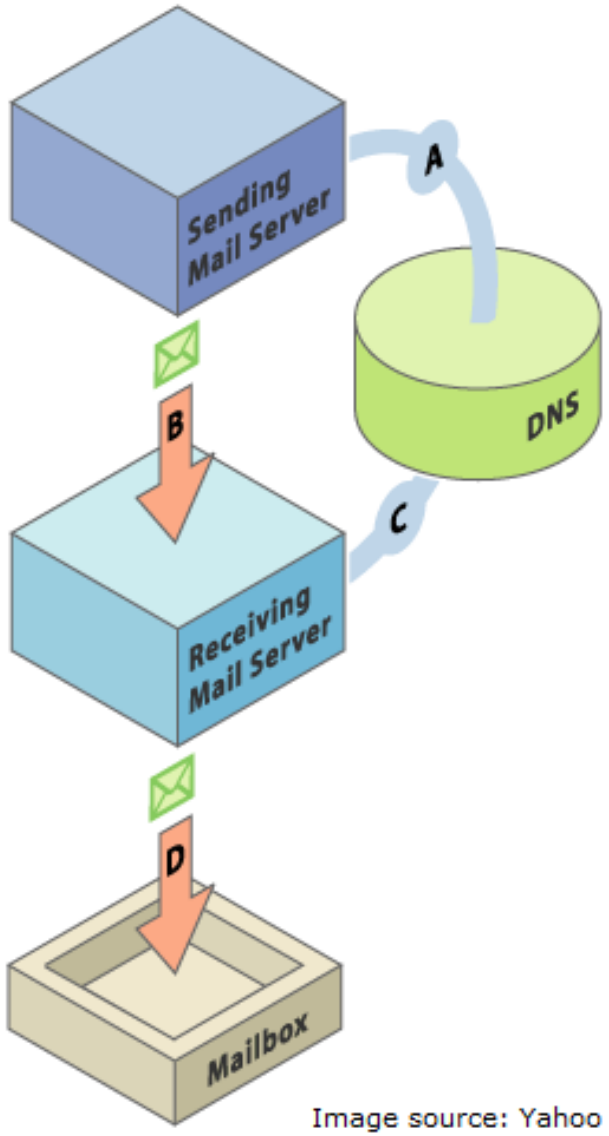
What can you do today?

- SPF and DKIM authentication – work with Network Admins
  - https://docs.marketo.com/display/public/DOCS/Set+up+SPF+and+DKIM+for+your+Email+Deliverability
- Create a bounce management infrastructure
  - Demo on next slide!
- If you still need help, you can work with Marketo Deliverability team, or use a 3rd party tool from Launchpoint
  - https://launchpoint.marketo.com/



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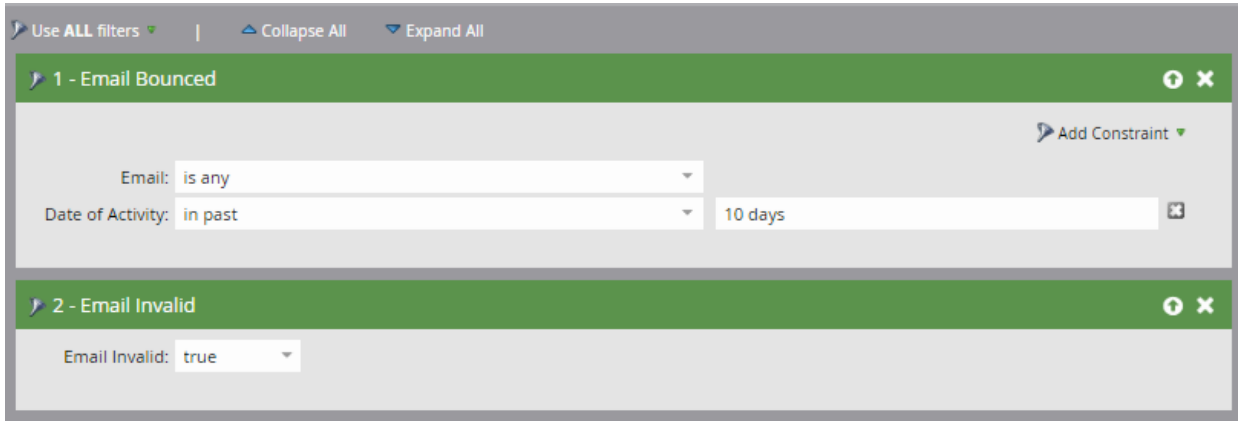
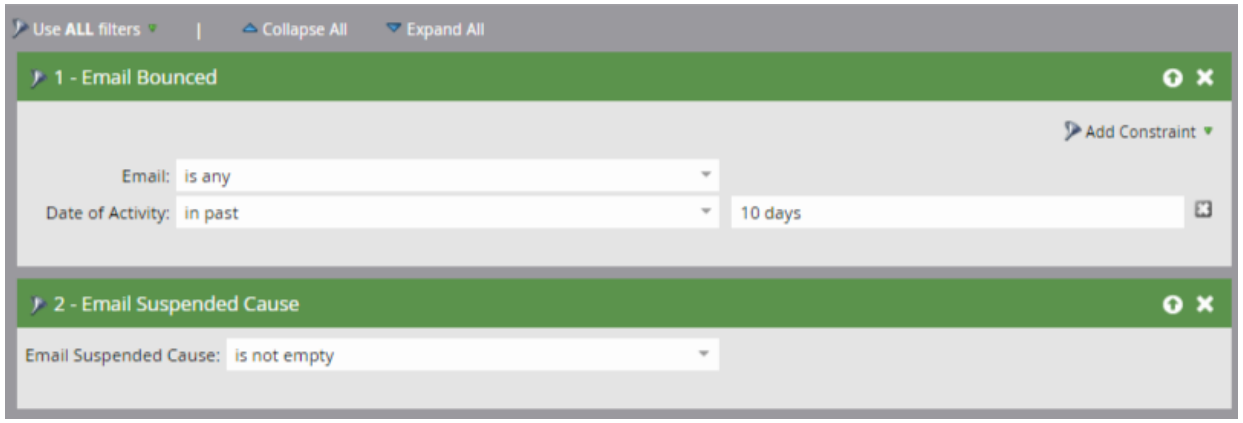
Creating a Bounce Management Program

- Create a program (default type)
- Hard Bounces:



- Spam traps and other soft bounces:



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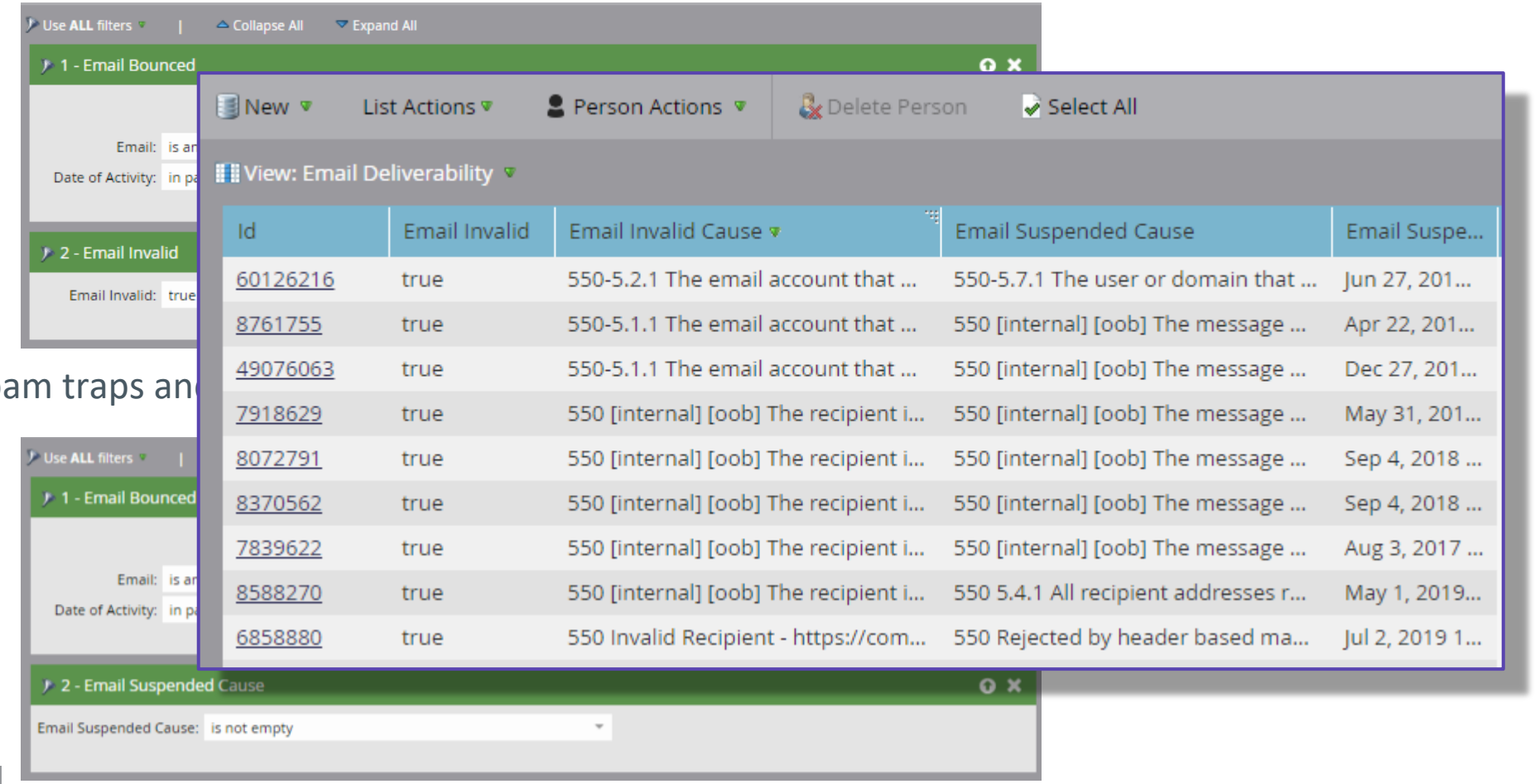
Creating a Bounce Management Program

- Create a program (default type)
- Hard Bounces:



- Spam traps an

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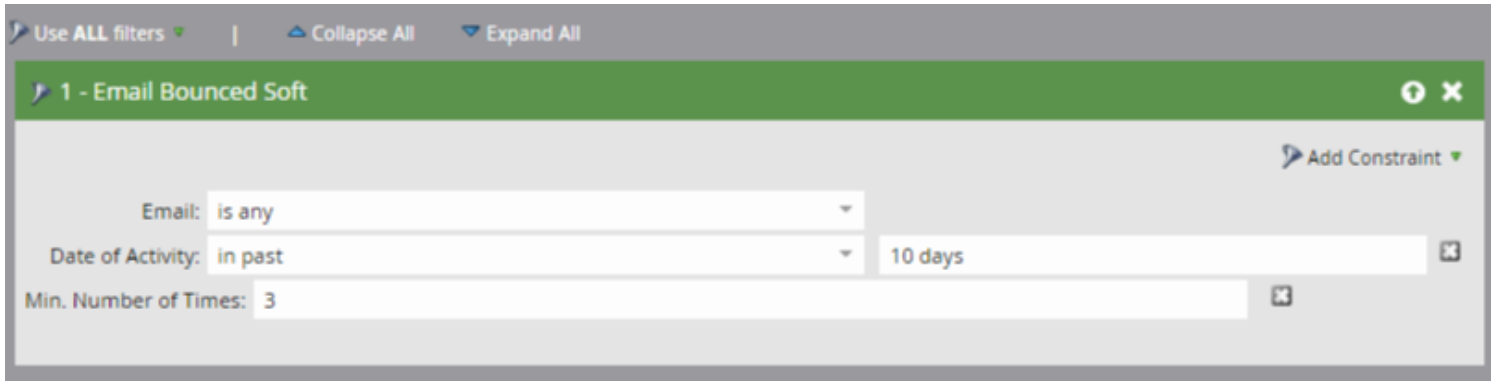
Creating a Bounce Management Program (continued)

- Soft Bounces:



- Now review the people captured by these smart lists as often as you like.
  - Find addresses that are fixable (“@gmal.com”, “@yahoo.com”) and correct them, then set Email Invalid = False.
  - Create a call list for your Sales partners to call and get updated email addresses
  - For any leads with addresses that are repeatedly failing, you can set your own policies!

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Duplicate Records

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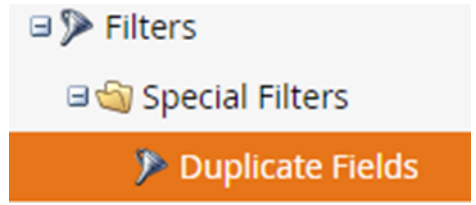
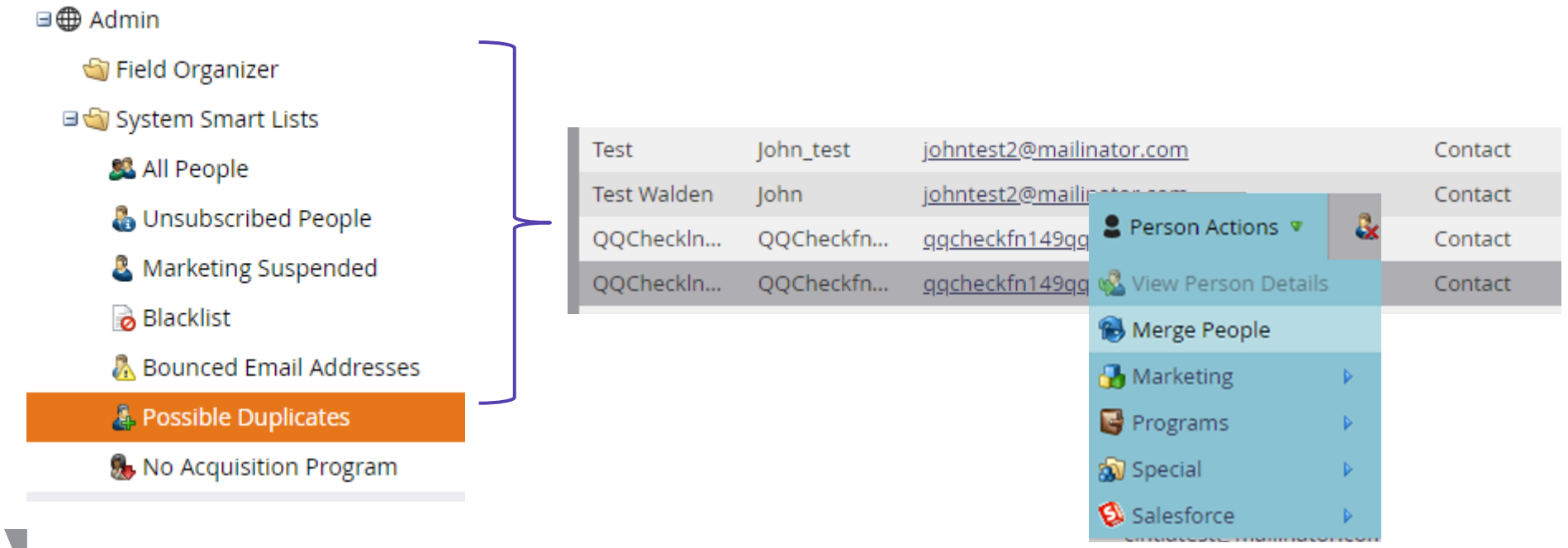
Duplicate Records: What does Marketo already do for you?

- Dedupes incoming leads by email address
- “Possible Duplicates” system list you can review regularly
- Provides a ‘Merge People’ flow action so you can choose the records and fields that stay, and those that are overwritten





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Duplicate Records: Gap Analysis

Gap analysis:

1. Unaddressed sources
2. Non-email duplicates
3. Different architectures

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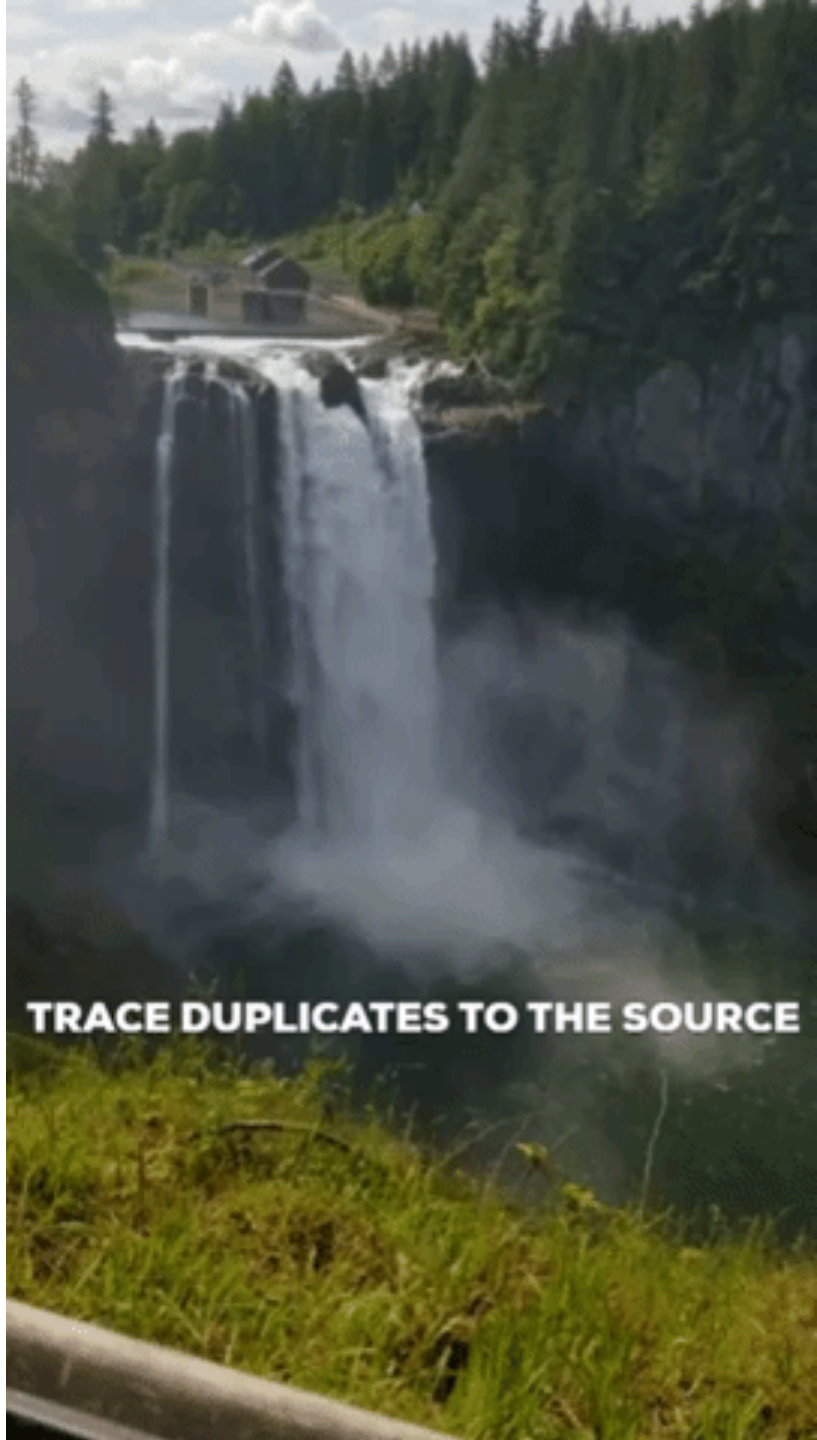
What can you do today?

In this order:

- Discover the source of duplicates in your database
- Work with your internal and external partners to address the sources
- Configure monitoring campaigns and proactively address future issues as they arise

Considerations before merging

- Your CRM will often be the source of duplicates
- When you merge records, you lose field level data, but all activity is appended to the winning record.
- Person records that have been merged will have more than one “Person is created” activity in their log.



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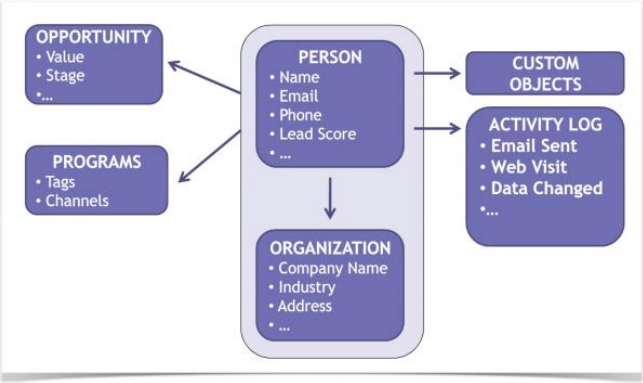
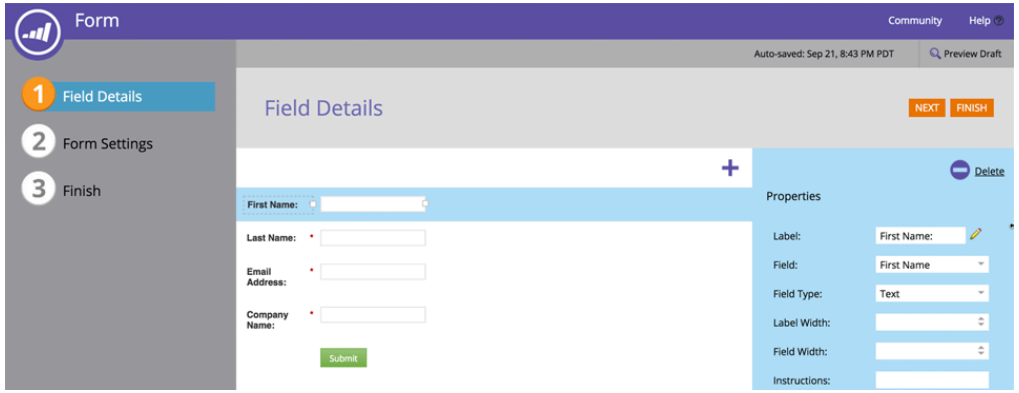
Common sources of duplicates (and suggested solutions)

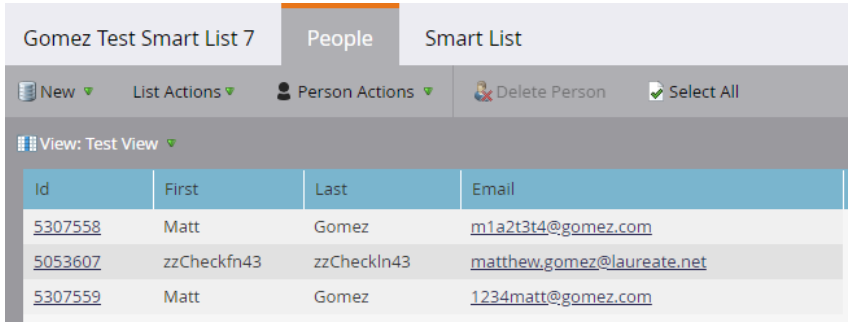
1. CRM Sync



2. Manual Entry in CRM



3. Different Emails; Same Person



Solutions:

1. Work with your Sales Ops counterparts to improve your sync to work with Marketo.
2. Create a Marketo form for manual entry of leads into CRM.
3. Create a “Secondary Email Address” field to store alternate email address, then merge records (from CRM). Add a preference center.

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Unused Fields

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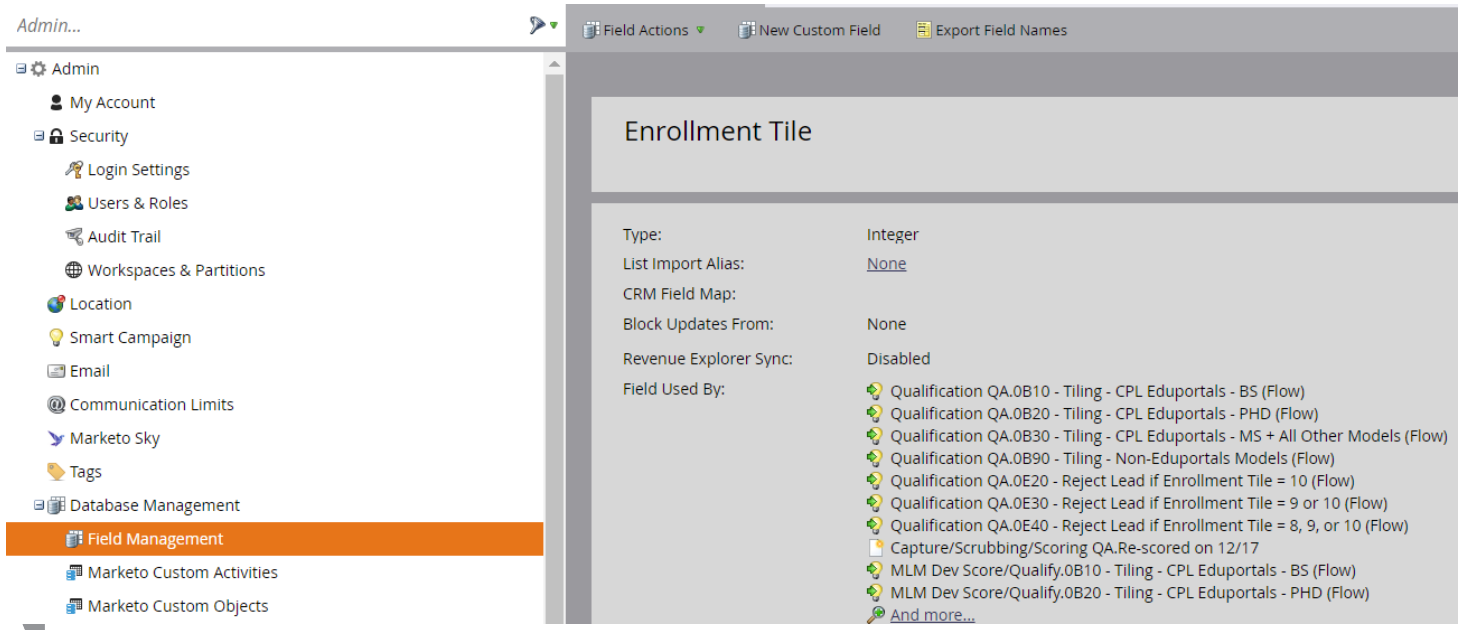
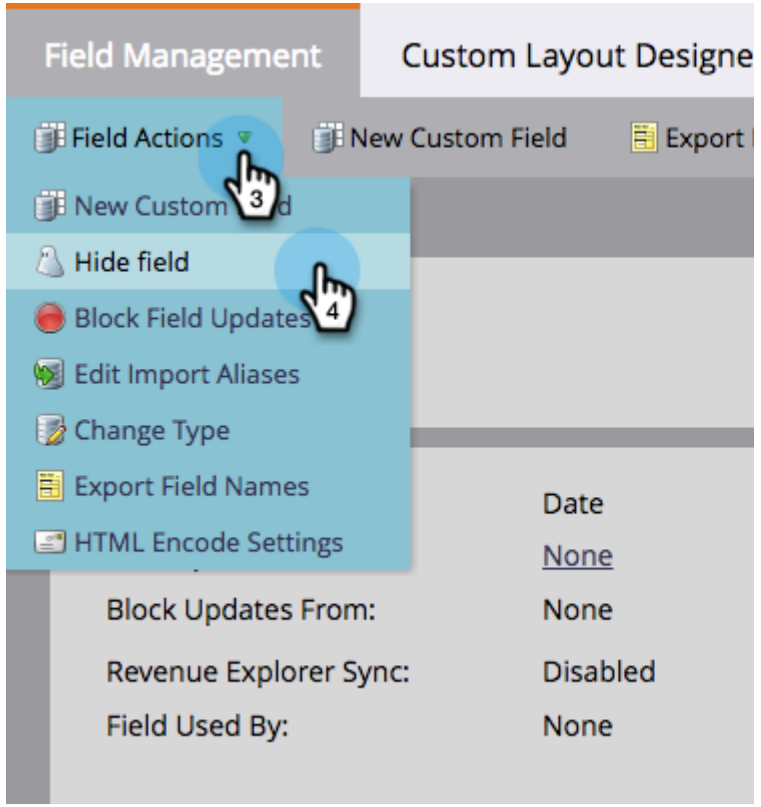
Unused Fields: What does Marketo already provide for you?

- Field Management in Admin section
  - Hide unused fields
  - View Field Sync to CRM
  - Field Used By
- Smart Lists to view field contents





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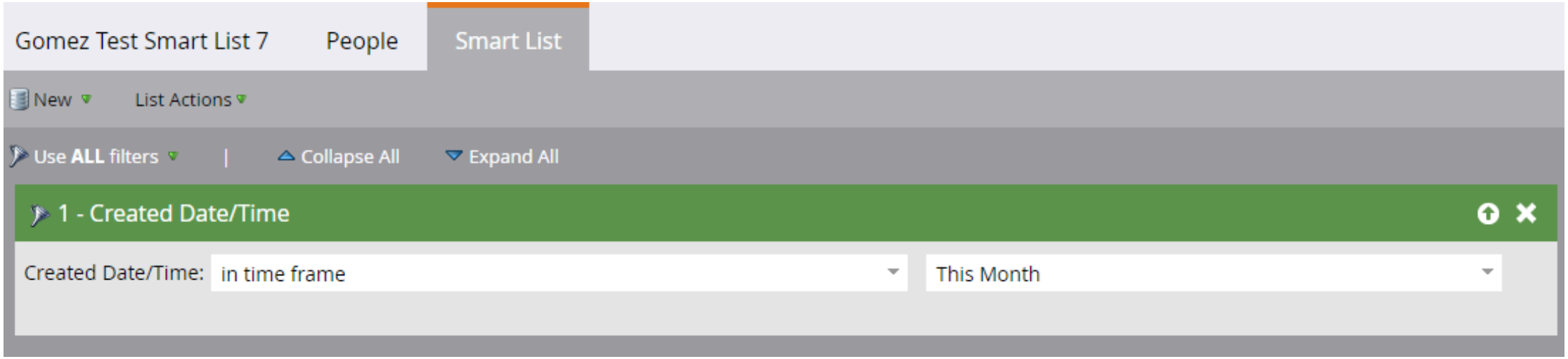
What can you do today?

- Hide unused fields from view
- Run smart lists to see which fields are blank
- Work with your CRM-side partners to hide fields from sync



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What can you do today?

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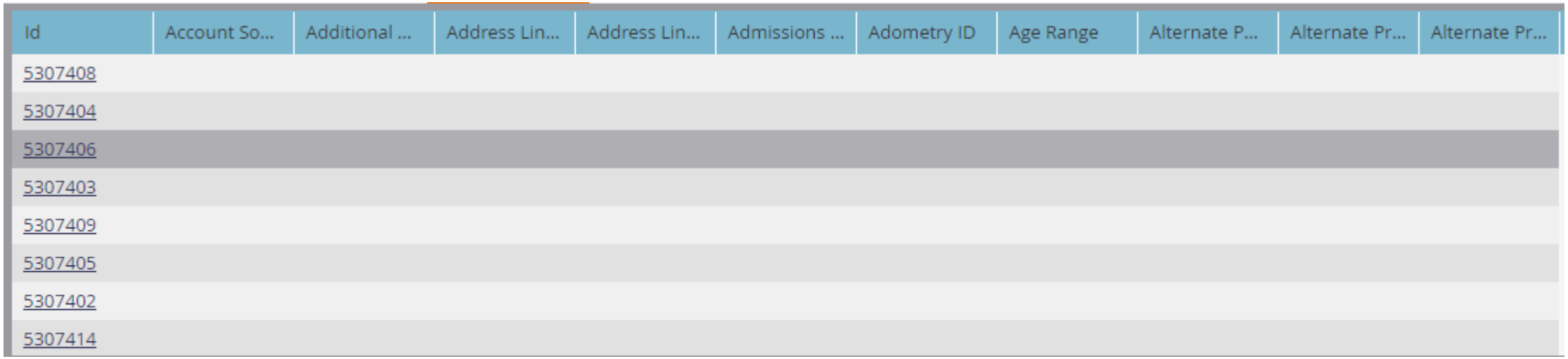

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5307402										
5307414										

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Archiving

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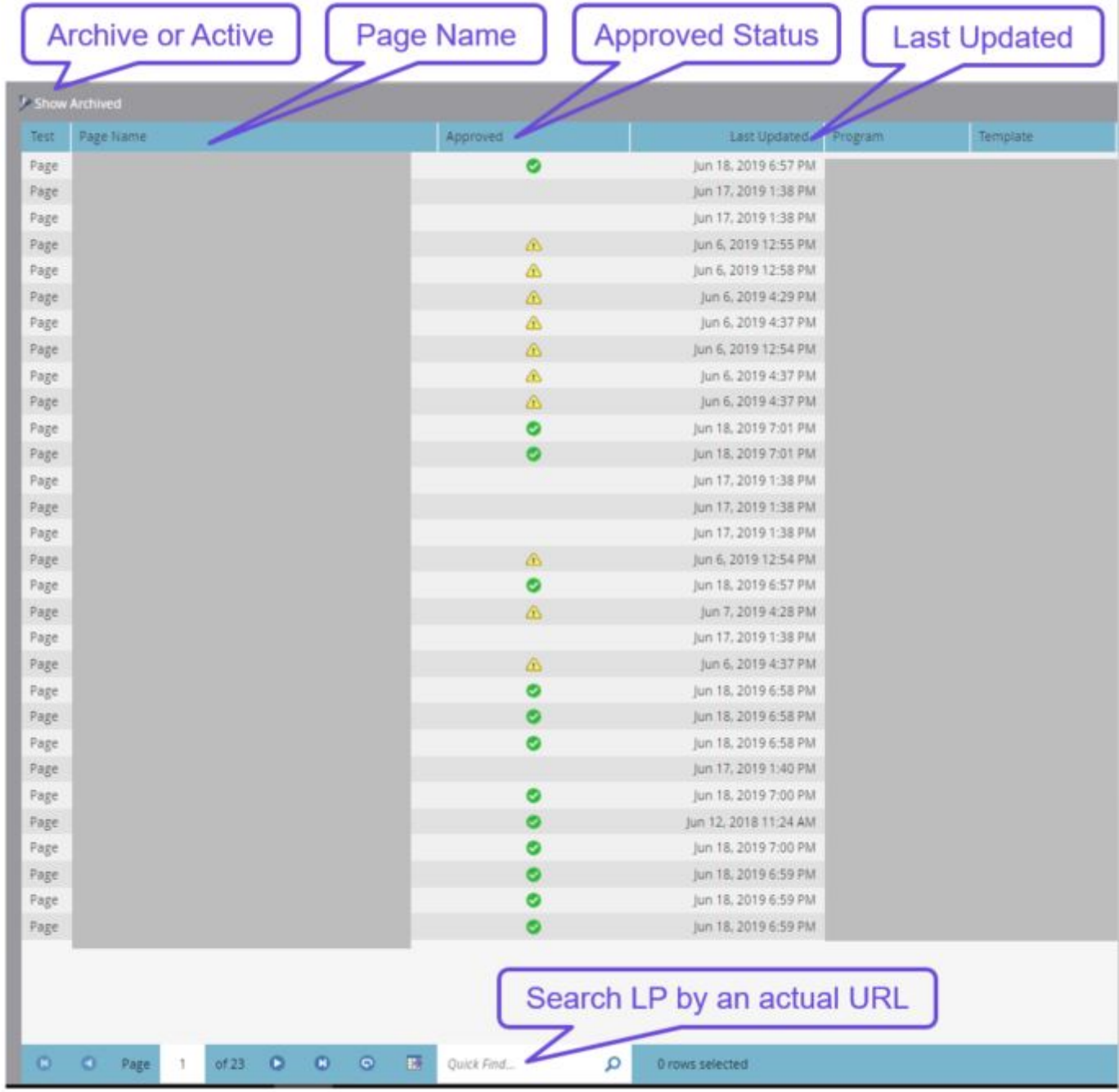
Archiving

- Regular exercise (at least annually)
- Archived assets are hidden from Revenue Explorer and separated in Analytics
- Keep the same folder structure as in active folders
- Turn off engagement programs!
- Deactivate smart campaigns!
- Unapprove landing pages!
- Consider deleting the forms!



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Efficiency tricks

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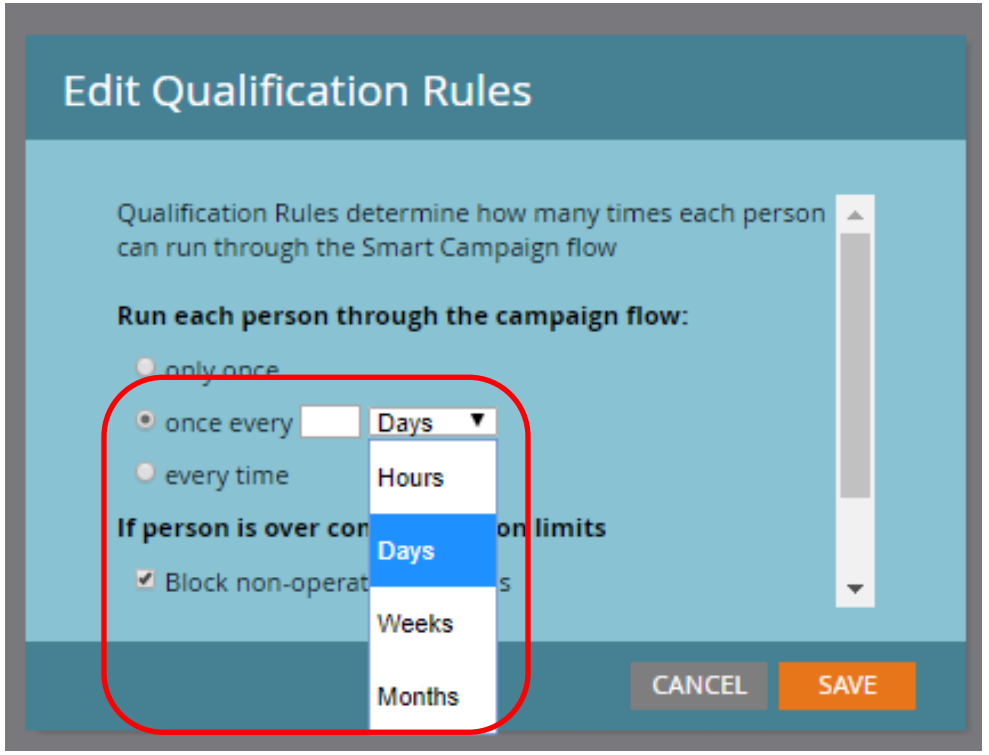
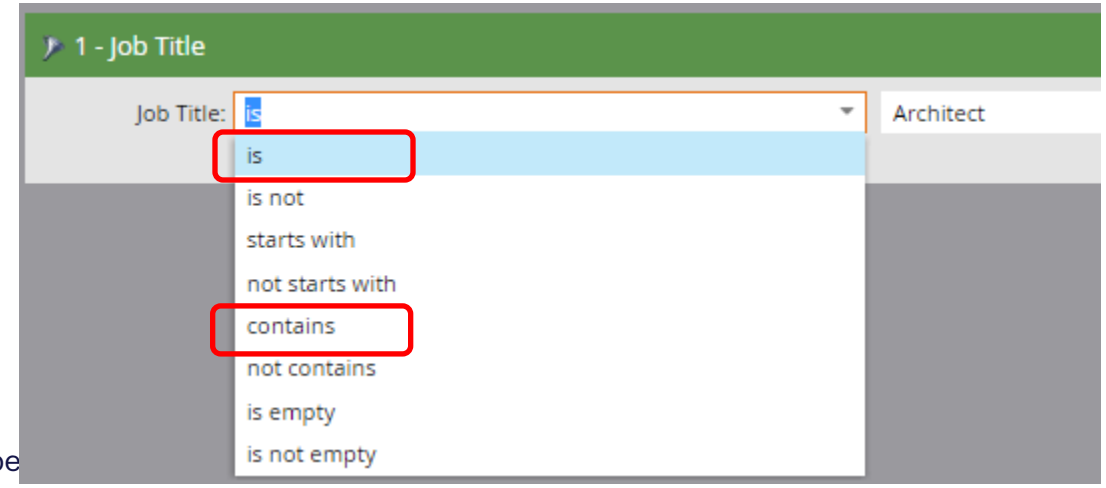
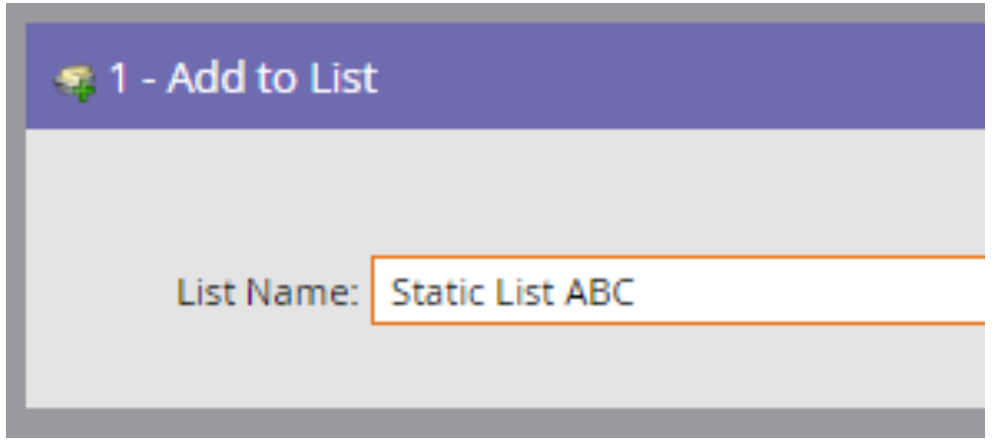
Make Marketo Fast

- Use recurrent batch vs. Triggers
- Use static lists vs. [nested] smart lists
- IS, not Contains; IS, not IS NOT
- Standard Reports with subscriptions and easy access







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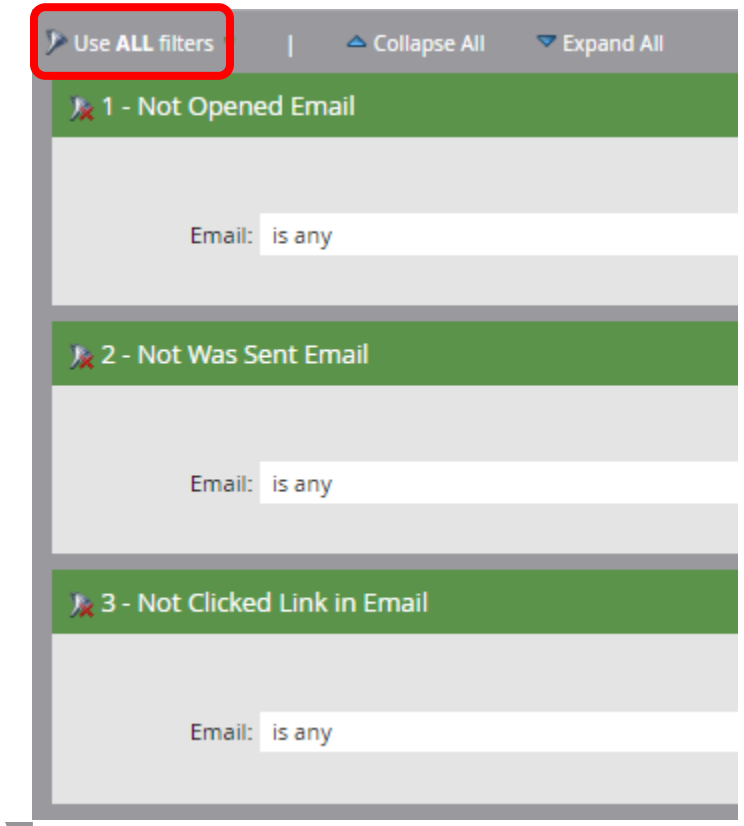
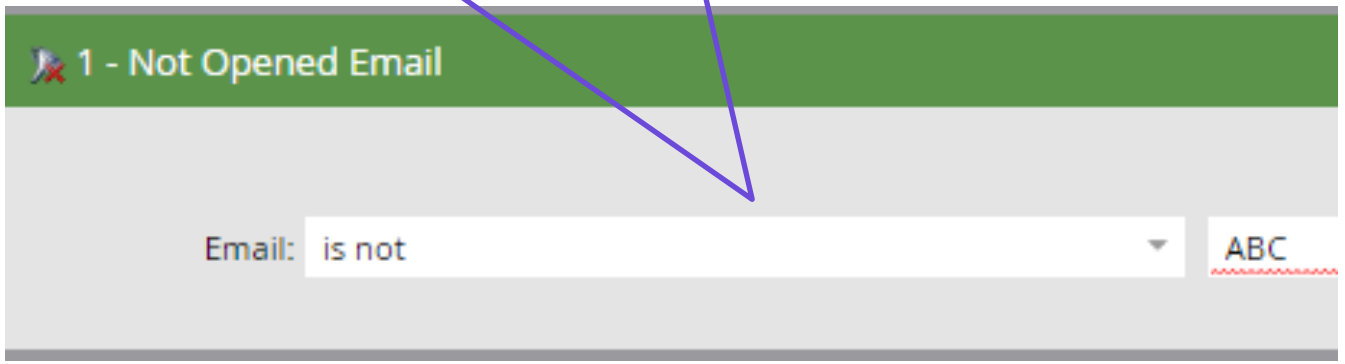
Negativity Filters

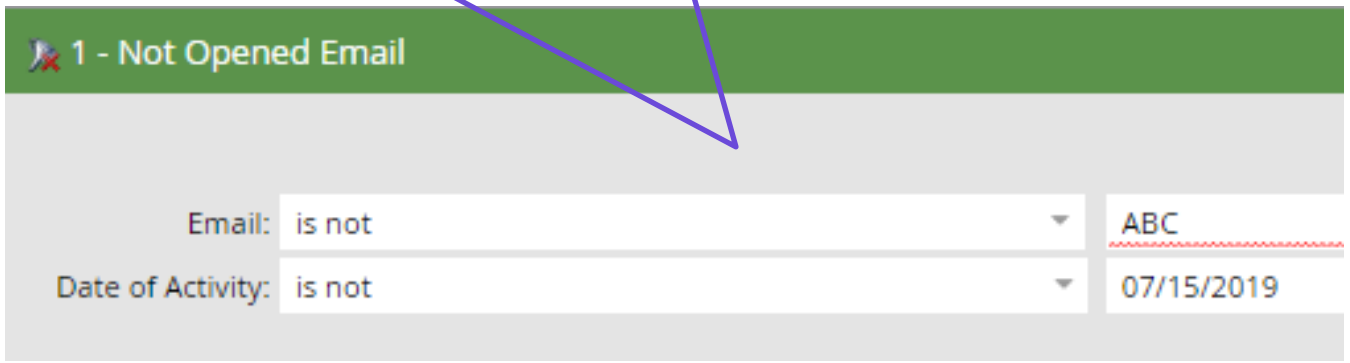
Reversed logic: Negative ALL is the opposite of the Positive ANY



Includes a person who opened email ABC



Includes a person who opened email ABC but not on 7/15/2019;
Includes a person who opened DEF on 7/15/2019



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Red Flags

- **Security / Compliance** concerns
- **Lack of clarity** & documentation
- **Dramatic increase or decrease** in ANY metric
- **Data Quality** critical issues
  - Duplicates
  - Key fields
  - Consent
  - Bounce rate
- **Messy folders, names, assets**
  - Sloppy, harder to find
- **Excessive cross-reference**
  - Harder to check
- **Custom everything**
  - Lack of standardization and quality control
- **Inconsistent errors**
  - You don’t know what you don’t know

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Safety Nets

- ✓ Approval process; a second pair of eyes rule
- ✓ Never launch immediately
- ✓ Start strict [easier to give rights vs. revoke]
- ✓ Always spot check [random 2-7 records]
- ✓ Check logic [counter logic or the residual]
- ✓ Sandbox, small batches, weekends
- ✓ Problem zones: set up reports

Simple is good.

Listen to the butterflies in your stomach.

Better looking is not as good as proven.

Higher pressure IS higher risk.

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Commit to tidy up!

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Thank You

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